

May 8, 2009

TO: Teresa Parsons
Director's Review Program Supervisor

FROM: Kristie Wilson
Director's Review Investigator

RE: **Karen Hoschar v. Department of Corrections (DOC)
Allocation Review Request No. ALLO-08-053**

On April 9, 2009 a Director's Review meeting took place by telephone conference call concerning the allocation of Karen Hoschar's position. Present during the telephone conference call were Karen Hoschar, Clallam Bay CC; Jack Brandt, Clallam Bay Supervisor; Joanne Harmon, DOC HR Office; Tina Cooley, DOC HR Office; and myself.

Investigator Finding

As the Director's review investigator, I carefully reviewed and considered all of the documentation in the file, the class specifications, and the information provided during the Director's review conference. Based on my review and analysis of Ms. Hoschar's assigned duties and responsibilities, I find that the classification that best fits Ms. Hoschar's overall duties and responsibilities is the Secretary Senior.

Background

On May 15, 2008, Ms. Hoschar submitted a Position Description Form (PDF) to DOC HR Office requesting that her position be allocated to an Administrative Assistant 3. Ms. Maines reviewed her request and issued her decision by letter dated July 30, 2008 (Exhibit A-4). In her letter, Ms. Maines stated the reasons and basis for her denial. On August 29, 2008, Ms. Hoschar filed a request for a Director's review.

Summary of Ms. Hoschar's and Mr. Brandt's Comments

Ms. Hoschar explained that she provides clerical and administrative duties in support of the Facility Manager, Mr. Brandt, and the Plant Maintenance Department within Clallam Bay Corrections Center. Ms. Hoschar asserts that she is the only support staff and has assumed the Plant Manager 1 duties.

Her daily duties include:

- Work requests – Assigns the work order a number, logs the repair, and notifies on staff assignment.
- Daily callouts – Tracks offender activity and closely monitors.
- Maintenance staff attendance – Tracks attendance and keeps her supervisor informed.
- Facility schematics - Uses AutoCAD as needed, sometimes several times a week and other times for hours at a time. She is given the rough schematics and does the schematics in AutoCAD on projects that need to be done inside the facility.
- Report, forms, and spreadsheets – Enters data and create spreadsheets quarterly for her supervisor. She puts together sustainable reports from this data. For example, how much fuel, garbage, water, power was used in a quarter.
- Maintenance purchase card – Make small purchases with supervisor approval. Enters purchasing information into the log and reconciles monthly with the Business Manager.
- Offender payroll – Enters the hours in the Offender Based Tracking System. Creates a hire list and puts together hiring packets which include hire and termination dates.
- Computer assistance
- Security clearances and scheduling - Runs background checks using NCIC to check criminal history for visitors, maintenance staff, and contractors. If a person does not clear the background check, Ms. Hoschar has the ability to run additional clearance; however, the final approval is granted by the Captain.
- Copy service – Supervises offenders during copying activities.

DOC HR Office Rationale

DOC HR office states that Ms. Hoschar's position description, signed May 15, 2008 (Exhibit B-3), is accurate. DOC HR office asserts that the majority of the duties and responsibilities assigned to Ms. Hoschar's position are within the scope and intent of the Secretary Senior job classification. Those duties include:

- Process work requests – Tracks requests, assigns number, and logs in.
- Coordinate daily callouts – Compiles information and enters into the system.
- Track attendance for maintenance staff – Track, log, and submit for approval.
- Input corrections and updates for facility schematics – Enters schematics into AutoCAD and the system generates a drawing with layout information.
- Prepare reports, forms, and spreadsheets – Compiles data and produces reports.
- Track offender payroll – Tracks on a spreadsheet and enters into a database.
- Assist staff with computer programs
- Coordinate the copy service – Runs the copy machine and oversees offender clerk.

- Maintain credit card and front end requests for purchases – Monitors, reconciles, and submits to the Business Office Manager for approval.

DOC HR office asserts that Ms. Hoschar has not been delegated one or more major program activities under a second line supervisor.

After listening to both Ms. Hoschar and DOC HR office and carefully reviewing all of the written and verbal information received, it was determined that the best fit for Ms. Hoschar's position is Secretary Senior.

Reason and Basis for Finding

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Most positions within the civil service system occasionally perform duties that appear in more than one classification. However, when determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. See Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

To determine if a position should be allocated to any level of the Administrative Assistant series, it must meet the Definition criteria of the Administrative Assistant 1 (class code 105E). The **Definition** states "*Provides para-professional administrative and staff assistance to a professional supervisor by reviewing, controlling, prioritizing and coordinating the work of the supervisor's professional staff; or performs technical work which is directly delegated from a professional position.*"

The definition for Administrative Assistant 3 class states:

Positions perform varied administrative and secretarial support duties or positions are responsible for one or more major program activities under a second line supervisor.

While Ms. Hoschar does provide some level of administrative support in addition to her secretarial support duties, her duties do not include having responsibility of a major program activity. I do not feel the daily callout is a major function of Ms. Hoschar's position. Daily callout is in all facilities and is assigned to the secretary. Daily callout is not unique to only the maintenance section.

I have reviewed the written documentation and the position description form for Ms. Hoschar and conclude that Ms. Hoschar's duties do not rise to the level of an Administrative Assistant 3 classification. Ms. Hoschar has not been delegated one or more major program activities under a second line supervisor.

The Class Series concept, as stated on the Secretary class specification (class code 100S) reads:

In support of a supervisor and/or staff members, provides secretarial services and assistance for the purpose of facilitating the supervisor's and/or staff members' own work and relieving the supervisor and/or staff members of day-to-day clerical detail. Applies knowledge of supervisor's and/or staff members' work commitments including status of projects and nature of contacts. Secretarial duties include making travel arrangements, scheduling meetings, taking notes and transcribing minutes, screening calls and visitors, keeping supervisor's and/or staff members calendar(s) and committing supervisor's and/or staff members' time.

The definition for Secretary Senior states:

Perform complex secretarial duties such as independently planning, organizing and prioritizing work, monitoring and evaluating budget(s) status and initiating corrections, developing travel itineraries, compiling reports, studies, and/or applications, developing, modifying, and/or maintaining data base management, office record keeping, or filing system(s), establishing office procedures, standards, priorities, and deadlines, and coordinating office operations. Positions initiate action to ensure work unit and/or office goals are met and have frequent contacts with clients, the public, staff members from other departments, students, and faculty.

Assignments and projects are of a complex nature. Independent performance of complex secretarial assignments requires substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment. Problems are resolved by choosing from established procedures and/or devising work methods. Guidance is available for new or unusual situations. Deviation from

established parameters requires approval. Work is periodically reviewed to verify compliance with established policies and procedures.

The focus of Ms. Hoschar's position involves secretarial duties within the Maintenance Department, such as:

- Receive work requests, giving them a number and then give to the Facilities Managers for assignment, and logged.
- Maintain callout workbooks
- Collect data and compile to create multiple spreadsheets for sustainability and energy costs.
- Clearance and scheduling of contractors, vendors, and visitors.

Although Ms. Hoschar periodically performs facility schematics, completes work requests, performs clearance and scheduling, I believe the scope of her assignments fall within the Secretary Senior classification. Ms. Hoschar's position is intended to cover a broad range of secretarial duties.

As previously noted by the Personnel Resources Board (PRB), the guidance provided in the Department of Personnel's Classification and Pay Administrative Guide establishes that the following standards are primary considerations in allocating positions:

- a) Category concept (if one exists).
- b) Definition or basic function of the class.
- c) Distinguishing characteristics of a class.
- d) Class series concept, definition/basic function, and distinguishing characteristics of other classes in the series in question.

After reviewing the documentation and comments from all parties with regard to Ms. Hoschar's assigned duties and responsibilities, I conclude the Secretary Senior classification best describes Ms. Hoschar's position.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to the Washington personnel resources board. Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

cc: Karen Hoschar, Clallam Bay CC
Joanne Harmon, DOC HR Office
Tina Cooley, DOC HR Office
Lisa Skriletz, DOP Classification and Pay Manager

List of Exhibits

A. Karen Hoschar Exhibits

1. Director's Review Request form.
2. Position Description Form, undated and unsigned
3. Position Review Request, undated and unsigned
4. DOC allocation determination, July 30, 2008
5. Org chart

B. DOC Exhibits

1. Reallocation Denial Letter
2. Position Review Request for reallocation to AA3
3. Position Description Form – requesting reallocation action to AA3
4. Secretary Senior Classification Specifications
5. Administrative Assistant 3 Classification Specifications